

Written evidence submitted by Welsh Sports Association (TOU0015)

Overview

The WSA's vision is for a 'vibrant, active nation', and our mission is to empower our members to be stronger and more successful, contributing towards a society fit for the future. Ensuring that there are accessible opportunities for the people of Wales to be active through sport and physical recreation is key to delivering a generational shift in attitudes towards health and wellbeing.

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We represent the deliverers and facilitators of a broad range of sports and activities in Wales, including national governing bodies of sport, community trusts, local authorities and trusts, and private providers. We work closely with Sport Wales and other relevant partners to champion the role of sport and its contribution to wider public policy. A number of our members are closely involved in Wales' tourism offer, whether in the marketing, promotion and organisation of major sporting events, or as part of our active tourism offer in terms of sport and leisure activities. We are grateful for the opportunity to respond to this consultation and wish to note that our responses are restricted to those questions within the consultation which are of relevance to our area of work.

Summary

Firstly, we would like to see the UK Government continue with the current reduced rate of 12.5% VAT beyond April and emphasise our desire to see this extended to activities in the sport and leisure sector, which form a key part of Wales' tourism offer.

We would like to see greater collaboration between Visit Wales, Visit Britain and the sports sector, to develop a strategic approach that aims to capitalise on Welsh sporting success at mega sporting events – such as the upcoming Commonwealth Games in Birmingham in 2022, the FAW joint bid to host Euro 2028 and internationally at the Qatar World Cup 2022, Rugby World Cup in Paris 2023 and the European Championships in Germany 2024. There needs to be a set of measurable aims, targets and outcomes to evaluate the success of boosting international tourism to Wales off the back of Welsh athletes and teams competing at international sporting events.

Furthermore, marketing tools like the thematic *Year of* campaigns should become more representative of the tourism businesses they represent. There should also be a consideration as to how these campaigns can improve awareness, generate funding for growth and carbon neutral options and really benefit tourism operators across Wales in the long-term. Online booking and information infrastructure that connects international visitors to tourism operators and makes their ability to navigate around Wales more accessible is also important. Furthermore, we would like to see better transport infrastructure between the north and south of Wales, and this in turn will provide better opportunities for Visit Wales and Visit Britain to embark on an all-Wales approach to marketing tourism rather than regional, where often mid-Wales which is so reliant on tourism often misses out.

How attractive is Wales as a holiday destination for international tourists?

For those who know about Wales, its glorious beaches, towering mountain ranges and impressive castles, it makes it no surprise that people flock to our beautiful country in their millions to take in its sights of immense natural beauty.

According to the 2019 *Wales Tourism Performance Report: January to December*, the number of international trips to Wales increased by 3.6% year on year to just over one million. Visitor spending was £515 million, which was an 18.8% increase on the same time the year before, with the Welsh Government reporting the value of overseas tourism to Wales in 2018 at £405 million.¹

Tourism is a key sector of the Welsh economy and is a significant provider of economic opportunities across Wales. It is more important to the Welsh economy than in any other part of the UK, accounting for 4.9% of economic output compared to 3.7% in the UK. West Wales and the Valleys have a tourism ratio of 5.7%, underlining the sector's key importance to these areas.² Wales has some of the UK's most tourism dependent local authorities including Anglesey, Gwynedd, Conwy, and Denbighshire, Powys and South-West Wales.

Renowned for their appeal to adventure and activity tourists, North Wales has gained a reputation as the "Adventure Capital of Europe". When comparing Gwynedd to the rest of Wales, taking part in active or adventurous sporting activities was notably higher: 16% had taken part in mountain biking (3% across Wales on average), 12% had done adventure sports (all Wales 2%), 10% had been swimming (all Wales 3%) and 9% had been cycling (3% all Wales).³ The outdoor industry contributes £481m (6%) of the Welsh economy each year, supporting over 8,000 FTE positions. In North Wales, the economic contribution of the outdoor industry is slightly higher at 8% of the local economy and the value-added contribution of outdoor activity tourism in Wales accounts for 10% of the Welsh tourism economy.⁴

In 2019, almost half of international visitors came to Wales to take part in outdoor or sporting activities. The most popular activity undertaken was walking, with 92% of people having walked more than two miles and 11% having cycled during their stay.⁵ In a year when the **Wales Coastal Path will celebrate its 10-year anniversary**, it presents a perfect opportunity to market Wales' most popular attraction – walking – to the world. The path is thought to generate around £84 million a year in visitor expenditure and with the fresh impetus of the Wales Coastal Path App, there a greater opportunities to connect international visitors to Welsh tourism operators.⁶ When considering the comments of the qualitative research that suggest Wales' strengths as a visitor destination lie in its natural environment, it is clear that outdoor activity tourism is an

¹ Welsh Government, 'Wales Tourism Performance Report January to December 2019', (2020), p.3.

Welsh Government, 'International Strategy for Wales,' (2020), p.22.

² Office for National Statistics, 'The Regional Value of Tourism in the UK', (2016), p.3.

³ Gwynedd Council, 'Wales Visitor Survey 2019', (2019) p.3.

⁴ Sam White and Mair Smith, *The Economic Impact of Outdoor Activity Tourism in Wales* (Monmouthshire: Miller Research, 2014), p. 41.

⁵ Beaufort Research, 'Wales Visitor Survey 2019 - Overseas Visitors', (2019), p.26.

⁶ Phillip Dewey, *WCP visitors give economy a £84m boost within a single year*, Wales Coast Path, (2016)

important contributor to the Welsh economy and will continue to grow in importance as the outdoor activity sector gains greater recognition.⁷

Furthermore, Wales is exceptional as a tourism destination in that sustainability is enshrined in law through its *Well-being of Future Generations Act 2015*. As part of its International Strategy, the Welsh Government notes its ambitions to be known as a “leader in sustainable adventure tourism”. Here there is an opportunity for bodies like Visit Wales and Visit Britain to help market this offer to the growing numbers of visitors seeking authentic, sustainable, and unique experiences.⁸ Up to 85% of overseas visitors considered Wales to be a sustainable tourism destination for holidays and breaks, with 61% of visitors overall **strongly** agreeing – up from 39% in 2016.⁹

The appeal to international tourists in the South-East of Wales are also markedly diverse. The Principality Stadium is Wales’ most popular paid attraction by far. A report by Econactive estimated that approximately 35% of visitors to the stadium have come from outside of Wales, with a particular emphasis on those from overseas who tend to stay longer and spend more.¹⁰ From hosting major sporting events, international football and rugby, the Champions League Final, boxing, popular music and showcasing events for Welsh culture, “the Principality remains an important and consistent economic presence in the Cardiff capital city region and is a critical element of the city’s visitor offer and positively impacts upon the city’s wider profile.”¹¹ Wales has a significant and successful track record in delivering international sporting events, from the Rugby World Cup in 2000, through to the Ryder Cup and current bids in place for Euro 2028 and exploration of hosting a Tour De France Grand Depart.

Recommendation: Visit Wales and Visit Britain should consult with the FAW and the FA in line with their joined-up bid to host the European Championship 2028 – using mega sporting events like this to maximise Wales’ tourism offer to the world.

Recommendation: We want to see Visit Wales work alongside the sports sector - as we see Welsh athletes compete at the Commonwealth Games in Birmingham 2022, Rugby World Cup in Paris 2023, Euro Championships in Germany 2024 and the FAW joint bid to host the Euros in 2028 – to come up with a strategic approach to promoting Wales’ brand through sporting competition on the international stage.

⁷ Beaufort Research, ‘Wales Visitor Survey 2019: Qualitative Research Findings’, 2019.

⁸ Welsh Government, ‘International Strategy for Wales,’ (2020), p.12.

⁹ Beaufort Research, ‘Wales Visitor Survey 2019 - Overseas Visitors’, (2019), p.36.

¹⁰ Econactive, ‘Twenty Years On: The Economic Significance of the Principality Stadium’, (2019), p.16.

¹¹ Econactive, ‘Twenty Years On’, p.33.

Does Wales have a sufficiently strong “brand” internationally and what more could be done to promote Wales as a holiday destination abroad?

Wales’ international brand has undoubtedly been accelerated as a result of our sporting success on the international stage. Euro 2016 highlighted Wales’ unreadiness to capitalise on its reinvigorated public image after storming to the semi-finals on one of the world’s biggest stages. Since then, as the British Council report *Towards a Welsh Sports Diplomacy Strategy* argued, “any benefits to Welsh society or economy have been ad hoc rather than part of a long-term strategy and allied to Welsh or wider British policy objectives”.¹²

As part of the 2019 Rugby World Cup in Japan, Wales embarked on a successful trade mission led by First Minister Mark Drakeford with the aim of “strengthening economic ties” and deepening links between the two countries. In countries like Japan, where there is a strong sense of provenance for food, drink and culture, iconic brands help us to strengthen our tourism offer and having a strong Welsh presence in these countries through sport is a great facilitator.

The Welsh Government recognises the importance of sport both at an international level and domestically, demonstrated by its ambition to host major sporting events in Wales. With Wales one game away from potentially competing on the most high-profile sporting stage of all, the Qatar World Cup 2022, what would our strategy for promoting Wales be? What mechanisms can we put in place for people to easily access the tourism experiences that Wales has to offer? Certainly, a strong Welsh presence and running advertisements in advance of the tournament would be central to developing a strategy.

The Welsh Government should look to come up with a strategy with aims, targets, and outcomes as to how they approach promoting Wales on the back of these events and the lasting presence we can have in those countries. For Visit Wales, this provides a perfect opportunity to be hold Visit Britain to account for robustly promoting Wales’ vibrant tourism offer - and must also consult with key stakeholders to take responsibility for developing a long-term strategy for marketing Wales overseas.

The 2020 Nations Brand Index (NBI) ranked Wales in 21st place overall out of 50 nations and “was the strongest in the UK.”¹³ This was Wales’ first year to be included in the NBI, with the aim of the research to provide an indication of Wales’ reputation internationally and globally. Some key findings to note: Wales ranked in the bottom five of the 50 countries included in the 2020 NBI in terms of respondent’s overall familiarity with Wales, just 53%. In terms of the index for Tourism, Wales ranked in the middle with its lowest attribute considered to be its “vibrant cities”. Perhaps most notably, Wales’ lowest ranked dimension was for Culture, where its low score relative to other nations for the “excels at sports” attribute helped contribute to it ranking in 29th place.

¹² Stuart Murray and Gavin Price, *Towards a Welsh sports diplomacy strategy* (British Council, 2020), p. 9.

¹³ Welsh Government, ‘The Anholt Ipsos Nation Brands Index: 2020 report for Wales (summary)’, (2021) NBI - An analytical tool which attempts to measure and rank the broad international reputation of 50 nations (60 after 2020), across six dimensions of national competence.

The 2019 *Wales Visitor Survey – Overseas Visitors* reported similar findings:

- One in ten overseas visitors overall recalled seeing the Visit Wales official tourist board website - rising to 13% of visitors from European countries.
- Only small proportions mentioned seeing or hearing any other type of advertising, marketing or publicity for Wales.
- Almost six in ten overseas visitors had not seen any advertising, marketing and publicity before visiting Wales (57% - rising to 63% of those from countries outside of Europe).¹⁴

The *Cardiff Tourism Strategy and Action Plan 2015 – 2020* recognised demand driven by sporting events, but the need for more ‘signature’ events capable of driving international stays. The UEFA Champions League Final was certainly an example of this with more than 300,000 people coming into the city on the evening of the final alone and more than 300 million watching on television all over the world.

Similarly, the 2010 Ryder Cup at the Celtic Manor resulted in a 16% increase in the numbers of overseas tourists heading to Wales. The *Visit Wales Golf Tourism Monitor* in 2010 reported that “the economic impact of golf tourism to Wales in 2010 was £41.9million, up 21% from 2009 (£34.7m) and 82% from when we started the Monitor in 2004 (£23.0m)”.¹⁵ The Ryder Cup acted as a catalyst upon which golf clubs across Wales have capitalised on to promote their all-Wales golf tourism offer – something which has been developed very successfully and should be learned from.

Recommend that Visit Wales consults with representatives of the Wales Golf tourism offer to understand how they have been so successful and how their model can be replicated to other sport and active leisure tourism offers and profile building international events.

At an international level, it is unsurprising that people tend to relate Wales to Gareth Bale or the national rugby team. The FAWs UEFA coaching programme is an interesting example, that has seen some of the sport’s biggest names like Thierry Henry, Patrick Viera, Mikel Arteta, and Chris Wilder to name a few. Having such successful, high-profile names go on to achieve great things in sport and recognise the ‘Welsh way’ as their foundations for success gives Wales an interesting form of power at the height of world football. There does not need to be a shift of emphasis, but in terms of branding, marketing, and product development, we need to understand how we can diversify brand positioning for Welsh sport, from football and rugby to our wider outdoor activity and adventure offer.

Recommendation: Visit Wales and Visit Britain should work closely with the FAW to leverage the soft power that its coaching programme creates – through its development of some of football’s biggest names.

Sport is massive in promoting Wales abroad and there needs to be a blueprint that capitalises on our nations sporting achievements as a gateway into marketing the sustainable offer that Wales has. The Welsh Government’s *Action Plan for Diaspora Engagement 2020 – 2025*, recognises the importance of connecting

¹⁴ Beaufort Research, ‘Wales Visitor Survey 2019 - Overseas Visitors’, (2019), p.37.

¹⁵ National Assembly for Wales Enterprise and Business Committee, ‘Tourism’, (2014), p.29.

people with an affiliation to Wales enhance its reputation on the global stage – “our people are our greatest advocate”. Though Wales has suffered from a lack of previously engaged diaspora, recent successful events such as Wales Week London saw the Welsh Sports Association involved in organising the bringing together of Welsh business people from around the world to talk about sporting infrastructure, facilities and other means of promoting Wales. This demonstrated there is a willingness from the diaspora to engage. In terms of tourism, the strategy aims to:

- Promote tourism and **measure the subsequent economic benefit of engaging with the diaspora community in increased overseas tourists visiting Wales.**
- Develop purposeful relationships with famous Welsh faces to raise Wales’ global profile across tourism, business, sport, culture, and the creative sector.

We believe there is a growing opportunity for the diaspora to become an asset in promoting Wales on the international stage, through more outward looking practices as well as helping Wales directly. The Welsh Sports Association has a role to play in facilitating discussions between organisations representing the Welsh Diaspora, Visit Wales, and the sport and activity tourism businesses that we represent to understand how to best promote Wales as a globally responsible brand.

Recommendation: Visit Wales should develop a strategy that capitalises on the travel of Welsh teams and athletes in international competition and maintain a presence in those countries with the aim of boosting tourism to Wales.

Recommendation: Set aims, targets, and outcomes to measure the success of Welsh tourism campaigns abroad using international sporting competitions, creating a model that can be translated beyond spor

How has the COVID-19 pandemic impacted the tourism industry in Wales?

These are some of the responses we received from our members who are engaged in tourism activity when asked how the Covid-19 pandemic has affected their businesses.

“Staycations are on the increase, we are seeing an increase in purchasing of boats, increased use of berths across Wales, clubs and centres showing greater need for activities for tourists. Major investment is need to promote and support the infrastructure for Marine Tourism.” - **Business A**

“We suffered losses in the lead up to the first lockdown, with a slow recovery at first after the last lockdown. Our numbers have been depressed for a while but recovering slowly to pre-Covid levels. Some people still do not have the confidence to return. We have particularly lost out on the larger groups - schools, outdoor centres, community groups - and those groups themselves need encouragement and funds to return to using our sector. International tourism to our sector will recover only when restrictions to travel are lifted, and our sector promoted by government.”

- **Business B**

“Would hope to see the return of more international travel for tournaments and competitions, and more people playing tennis casually when visiting Wales again with pay & play and equipment hire growing. Collectively we need to show people where they can play tennis, Padel, golf, hire bikes, purchase tickets for things whilst they're visiting.” – **Business C**

“We have still managed to build a client base but it’s been tougher than predicted. We have riders from all over the UK but need to get ourselves promoted more.” - **Business D**

What will be the impact of a return to the 20% rate of VAT from April 2022 for the tourism industry in Wales?

Currently the rate of VAT stands at 12.5% following a rise from the temporary cut of 5% in July 2020 to help businesses struggling in the pandemic. The Treasury plans to return the tax to the pre-pandemic level of 20% starting in April.

The proposed return to 20% VAT has led to fears amongst our members, and the wider hospitality and tourism sector, that their businesses will be thrown into a much more vulnerable position. The industry has undoubtedly been the hardest hit as restrictions have made the last two years exceptionally difficult for tourism, and so it is vitally important that we give our tourism businesses the best chance to recover. Tourism is more important to the Welsh economy than in any other part of the UK and with the right targeted approach has the potential to play a crucial role in Wales' economic recovery.

The greatest fear noted by our members in the sport and leisure sector about bringing VAT relief measures to an end, was the compounding pressures they are already facing amid the increasing costs of living, fuel, energy prices and rise in the minimum wage and national insurance. In what is already a challenging environment, growing costs being reflected in rising prices is prompting fears that people will become more nomadic in their habits, and less willing to spend on activities and events beyond their food and accommodation.

For those businesses who only benefitted from lower tax rates in the café on their premises and not on their leisure (sport) offer, they found themselves less able to build up reserves post lockdowns. Many businesses would have like to have benefitted from a lower tax rate on their leisure (sport) activity offer: One business for example had to charge 20% on all climbing entries, activities and courses, and after receiving lower income in the first months since the end of lockdowns below what they would have expected, were insufficient to qualify for the Economic Resilience Fund Grant. Many businesses lost out in this way and as a result find themselves facing greater uncertainty.

Increasing operational costs, a deficiency in qualified staff and poor marketing were also identified as barriers to the development of outdoor activities in Wales.¹⁶ As we look to revive our tourism, one argument for maintaining a reduced rate of VAT is that it brings us in line with the levels of VAT levied in our competitor European nations, the UK's rate of 20% is almost twice the European Union average, limiting the UK tourism sector ability to rebound strongly and deliver jobs and growth around the country.¹⁷ A report by Professor Annette Pritchard found that, in Ireland, cutting the VAT rate to 9% in 2011 helped the sector generate an additional 57,000 jobs nationwide as a direct result of international visitors to Ireland. Notably, it was also reported that the reduction in VAT boosted tourism tax revenues from €1.265bn in 2011 to €1.911bn in 2016 (+ €646m).¹⁸

¹⁶ White and Smith, *The Economic Impact of Outdoor Activity Tourism in Wales*, p, 24.

¹⁷ Cut Tourism VAT, 'Campaign Fact Sheet' (2017).

¹⁸ Professor Annette Richards, 'A Tourism Tax for Wales?', (2017)

Irish Tourist Industry Confederation, '9 Reasons why 9% Matters', (2017).

Chief executive of UKHospitality, Katie Nicholls, said that “with the right support, [tourism] can play a crucial role in the country’s economic recovery and help rebuild people’s wellbeing after they have had to live under social restrictions for the past two years.”¹⁹

Retaining lower rates of VAT would also encourage people to holiday domestically rather than looking overseas. Wales had its fair share of the ‘staycation boom’ throughout the pandemic and domestic visitors to Wales are expected to remain strong in the short term.

However, with Covid-19 restrictions and chronic shortages of staff, many operators were unable to fully open to cater for this increased demand. Now with increased living costs, rise in the minimum wage and greater taxation, it is the consumer who will bear the brunt of increased prices. We want to see the conditions that businesses need to return to financial strength and provide the best possible service to consumers and retaining lower rates of taxation are key to this. Professor Adam Blake, a UK Treasury Advisor, similarly concluded that: “cutting tourism VAT to 5% is one of the most efficient, if not the most efficient means of generating GDP gains at low cost to the Exchequer.”²⁰

Recommend that the UK Government extends the reduced rate of 12.5% Vat in hospitality and emphasise our desire to see this extended to activities in the sport and leisure sector, which form a key part of Wales’ tourism offer.

¹⁹ Kate Nicholls CEO UK Hospitality, ‘More than 250 hospitality business leaders urge chancellor to hold vat at 12.5% to protect jobs’, (2022).

²⁰ Annette Richards, ‘A Tourism Tax for Wales?’, p. 2.

What steps are needed post-pandemic for the tourism sector in Wales to recover and grow its international appeal?

There are several crucial factors that need to be looked at. Firstly, we need to address the long-term structural issues that Wales has faced in encouraging visitors from outside of the United Kingdom, and how we respond to the new challenges that have arisen over the last eighteen months. The *Institute of Welsh Affairs* highlight a shift in the way in which people are travelling. They argue that we will see a huge drop off in the numbers of long trips taken to little-and-often. “The capital of social bragging, the ease of online bookings in location and the ‘off the beaten track’ travel opportunity,” all these factors are on the up across all age groups.²¹

This is something that adventure and outdoor activity tourism operators are in a perfect position to capitalise on with the right targeted support – **particularly due to its appeal to off-peak shoulder season visitors**. According to the *Wales Visitor Survey for Overseas Visitors*, over four in ten overseas visitors to Wales in 2019 were considered ‘adventurers’; this rose to half of all overseas visitors during the shoulder months.²² The year 2016 marked the beginning of Visit Wales adopting thematic years, part of a long-term ambition to grow a stronger and more defined brand for tourism and increase visitor volume and value. The first was the *Year of Adventure* and aimed to build on the success stories of attractions like Surf Snowdonia and Zip World. **What processes are in place to measure the effectiveness of these campaigns in attracting visitors from overseas? What were the targets and aims to achieve? Did businesses with an adventure offer outside of North Wales benefit from the Year of Adventure and what mechanisms were implemented as part of a long-term strategy to establish an all-Wales framework for promoting adventure activities as a result of the campaign?**

In 2018, the *Year of the Sea* coincided with Wales hosting of the Volvo Ocean Race, the longest round the world Yachting race with teams entering from all over the world. We would have like to have seen greater collaboration with organisations in the marine tourism industry on how they could benefit from the campaign – such as better funding to improve the ageing stock and infrastructure to promote inclusive activities as a result. 2020 saw the *Year of the outdoors*, which was of course severely affected by the pandemic. with Visit Wales aiming to continue building on this vision of brand marketing, the pandemic has created an opportunity to think about how the campaigns can have a lasting, positive impact on the businesses it represents.

Work with [Visit Wales] to integrate its marketing campaigns with sports events around the world. E.g., Swansea.com stadium instantly takes anyone travelling to a major event to the website showcasing what the city has to offer. Visit Saudi, Visit Abu Dhabi, Visit Dubai, Visit Malaysia etc. adverts particularly on our sports channels, our stadiums (Cardiff City FC) and during major sporting events like the Euro 2020 Championships. With Wales projected to qualify for the Qatar 2020 World Cup Finals we should start to think about how we can advertise Wales using these events. Can Visit Wales use these events – like the Rugby World Cup in Japan – to establish a lasting presence to promote Wales, as we know that repeat visits are more likely to occur from Europe and countries like Japan in Asia where we have made these connections.

Recommend that capitalising on sport as an opportunity to promote Welsh tourism is integrated into the practices and policies of tourism bodies such as Visit Britain and developed as part of a long-term strategy.

²¹ Ant Pickles, ‘Tourism: How Can Wales Perform Better?’, *Institute of Welsh Affairs*, (2021)

²² Beaufort Research, ‘Wales Visitor Survey 2019 - Overseas Visitors’, (2019), p.14.

How can the UK and Welsh Governments and bodies like VisitBritain and Visit Wales better work together to make Wales a more attractive destination for international visitors?

Tourism in Wales is a wholly devolved area, and VisitBritain has retained responsibility for marketing Great Britain on the international stage. We want to see better working relationships between Visit Wales, VisitBritain, Welsh and UK government in promoting a globally responsible Wales. How can we ensure that VisitBritain is held to account for increasing Wales' share of international visitors? We want to see Visit Wales take greater responsibility for marketing Wales' sporting offer, particularly when Welsh athletes and teams are represented at international sporting events.

There needs to be a strategic approach and appropriate support surrounding tourism in Wales, and a cross-sector willingness to help grow Wales' international appeal. It is the mission of Visit Wales to listen to and represent the interests of the industry across Wales and **to take an evidence-based approach.**

Recommend therefore that Visit Wales and Visit Britain work with their partners and actively seek to fund research that considers the thoughts of our international visitors, industry, and wider stakeholders to develop and improve our tourism offer.

The Scottish Tourism Alliance developed its second Marine Tourism Strategy *Giant Strides 2020 – 2025*, following the marked progress of its initial strategy *Awakening the Giant 2015 – 2020* which set out to boost visitor expenditure from £101m to £145m and increase the overall economic value of the sector from £360m to over £450m by 2020. By 2016 the visitor expenditure had reached £131m and the overall contribution of the sector – Gross Value Added (GVA) – in 2017/18 reached £411m.²³

Through consultation with our members we found there was an intention off the back of this research from bodies representing marine tourism in Wales to consider an approach in line with the Scottish model. They were left frustrated as “no one body was **willing** or **able** to take this forward”. Discussions further broke down as a result of the pandemic, however we would like to see these talks renewed with the support of Visit Wales, Welsh Government and partners in UK Government and the Scottish Tourism Alliance, as well as voices from Welsh ports, harbours, marinas, and the boating community to identify opportunities as to how this strategy can be translated to work here in Wales.

This research demonstrates the valuable contribution industries such as marine tourism can have by bringing together key stakeholders and securing the necessary political drive (and funding) to develop and implement a strategy such as this – that we would like to see replicated in Wales.

It is important to note that we would like to see this approach replicated throughout Wales, to uncover the diverse adventure and active tourism that Wales has to offer, and so that all businesses are represented and able to market themselves to the world. There is a strong desire among active tourism businesses to receive support in promoting their companies effectively as well as better access grants and funding to assist with

²³ The Scottish Tourism Alliance, 'Giant Strides 2020 – 2025', (2020), p.10.

growth and **steps towards carbon neutral operation.**

The Welsh Sports Association can work with our members who have an interest in developing their tourism offer, to facilitate discussions with our connections in Welsh Government and Sport Wales. As part of their government remit letter for 2021-2026 Sport Wales were asked to reflect 'Welcome to Wales – Priorities for the visitor economy 2020-2025' in their business planning and are urged to create and maintain strong links with the Welsh Government's tourism development team to grow the sporting tourism offer in Wales. As the independent membership body for sport in Wales there is an opportunity to connect Sport Wales to the voice of sport and active tourism in Wales, an area outside the usual areas of activity for Sport Wales.

In a 2014 study into *The Economic Impact of Outdoor Activity Tourism in Wales*, it was apparent that the cross-promotion and collaboration between activity providers and wider tourist services such as hospitality were extremely limited.²⁴ This was partly considered to be the result of fierce competition between providers, it was also acknowledged that "efforts to create greater collaboration with accommodation provision through packages are hindered by European Union regulations which place additional registration and protection requirements on sellers of package travel". There may be an opportunity to revisit these regulations to make them more favourable to Welsh tourism businesses.

The Miller Research Survey found that over a quarter (27%) of activity tourists surveyed stated they would consider taking "longer activity tourism trips to Wales if packages with accommodation were available". Therefore, a targeted approach from Visit Wales and its partners to work and improve knowledge and understanding and develop an approach to Business-to-Business relations would help to extract greater economic value from the adventure and activity tourism sector. Furthermore, as restrictions on package travel holidays are less problematic, there is an opportunity to encourage service providers with the incentives that remove competition and work for the greater good of the Welsh tourism economy.

Recommend that Visit Wales and Visit Britain consult with the UK Government about the potential barriers and opportunities for creating specific tourism bundles (packages) that encourage co-operation between hospitality, leisure and tourism operators.

²⁴ White and Smith, *The Economic Impact of Outdoor Activity Tourism in Wales*, p, 27.

What infrastructure and transport reforms are needed to make it easier for international tourists to reach Welsh destinations and attractions?

It is no secret that poor public transport links and the time it takes to drive between the South and the North of Wales has long been considered a barrier to domestic and international tourism. More and more people are recognising the benefits of taking a sustainable tourism approach to their holidays, and with so much of Wales' low impact attractions and focus on sightseeing, natural beauty, castles and outdoor activity – we need to consider having the transport and travel infrastructure to match.

Lack of transport links from the north and the south make it difficult for a united all-Wales approach to promoting Wales. The North Wales international tourism campaign, launched to attract high-spending overseas visitors to the region after the easing of Covid restrictions, is a welcome move yet largely limited to the North. Similarly in the South, where spending by overseas visitors as a result of attractions like the Principality Stadium only seek to benefit the immediate surrounding areas, creating a difficult divide between the north and south and the active tourism businesses in mid-Wales who often miss out.²⁵

How can we encourage people to explore rural Wales, navigate beyond the major attractions where there are fantastic, sustainable active adventure offer like off-road biking, mountain climbing, cycling, and walking, yet are often more than a 40-minute car journey from the nearest train station? The *Institute of Welsh Affairs* has labelled this “the final mile,” noting that there are some fantastic opportunities in some very remote locations, but the impracticality of accessing the most off the beaten track accommodation and activity offers are simply too off putting for many international travellers.²⁶

Recommendation: Better transport links between North and South Wales will allow an all-Wales approach to marketing Wales - must be a national approach to promoting the various ways of accessing our nation

The *2019 Wales Visitor Survey* found that six in ten overseas visitors reached Wales by hired car (35%) or private car (25%) – down from seven in ten in 2016. Just over 27% used public transport (18% travelling to Wales by train and 9% by bus). Not surprisingly, the use of private cars dominated methods of travel around Wales during visits from international tourists. Three in ten overseas visitors used public transport (16% train, 14% public bus or coach) while 8% walked. The proportion of overseas visitors using public transport in Wales has increased from its 2016 level of 22%.²⁷

In 2016, the quality and availability of public transport was one area that overseas visitors claimed their experience could have been enhanced. This was consistent with the responses to the Qualitative Findings found in the 2019 Wales Visitor Survey was that “it had been difficult to find appropriate public transport information when planning their holiday” (visitors from Germany and Italy).²⁸ Individuals also spoke of wishing to see more public transport and more advertising of what is on offer, improved parking at busy locations and

²⁵ White and Smith, *The Economic Impact of Outdoor Activity Tourism in Wales*, p, 45.

²⁶ Pickles, ‘Tourism: How Can Wales Perform Better?’, *Institute of Welsh Affairs*.

²⁷ Beaufort Research, ‘Wales Visitor Survey 2019 - Overseas Visitors’, (2019), p.17.

²⁸ Beaufort Research, ‘Wales Visitor Survey 2016 - Overseas Visitors’, (2016), p.34.

clearer online information regarding public transport.

These findings are very much in tune with calls from our members for better online booking and information infrastructure such as a specific all-Wales adventure and activity tourism bundle that promotes our diverse sector. This should be distinguished from other kinds of 'leisure' such as accommodation and hospitality and provide clear online information about what transport routes can connect overseas tourists to their businesses. Like easy access booking of accommodation, online search functions to find sporting activities, where international tourists can find increasingly popular pay & play tennis, padel, hire bikes, climbing, marine activities, walks and more diverse adventure offers and how to access them through public transport links would be beneficial.

Local authorities could also consider specific formats to promote tourism, such as using the information in the Active Travel Network Map to create maps for walkers only, or cyclists only, or specific categories of the two. In its Active Travel Guidance, the Welsh Government suggests Local Authorities should consider parameters and outcomes to boost tourism activity – such as installing increasingly popular electrically assisted pedal cycles (EAPCs) in rural tourism areas for example. Committing to signposting ways in which people can access the fantastic tourism offers businesses in Wales have to offer is key to improving accessibility to overseas tourists.

Recommendation: Visit Wales and Visit Britain should encourage new infrastructure undertaken as part of the Wales Transport Strategy to consider its impact on tourism.

Recommend that Visit Wales and Visit Britain works more closely with businesses who are eager to advertise their tourism offer in an online format that promotes their offer and the ways in which visitors to Wales can access them.

Recommend that there is investment in online information and booking infrastructure that gives all sport and activity tourism businesses the opportunity to market themselves within the matrix of a wider tourism network – and more information about transport links international visitors can use to access those regions.

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